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ABSTRACT

A weeklong interdisciplinary seminar/workshop was held September 8-14, 2001 in Victoria, Canada to discuss the relationships between globalization, trade liberalization, and higher education, and to share information about the implications and impact of various multilateral trade agreements on higher education. A major purpose of the workshop was to outline a broad research agenda for this area. Some of the trends identified in higher education in the new global context are the changing objectives of higher education, new labor force demands, the massification of higher education, and increases in the number and diversity of higher education suppliers. New technology and the internationalization of colleges and universities are important elements of the new context for higher education. The workshop can be said to have achieved its main objective of mapping a broad agenda for research on the relationships between, and effects of, globalization and trade liberalization on higher education. Research objectives are identified for: (1) higher education and the knowledge society; (2) the emerging global economy; (3) multilateral trade liberalization; (4) regional free trade agreements; and (5) trade in education services. The following are appended: List of Participants; Schedule of Seminar/Workshop; and List of Related Readings. (Contains 63 references.) (SLD)

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GLOBALIZATION, TRADE LIBERALIZATION AND HIGHER EDUCATION: RESEARCH AREAS AND QUESTIONS

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Series Editor
Alexander D. Gregor
The University of Manitoba

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Introduction

Despite the potentially significant impact of trade agreements on higher education, it rarely receives significant attention from government officials or trade negotiators, who are concerned about much larger service industries such as financial services, engineering, and management services. Scholars with an interest in international trade policy and international economics have also given little attention to the economics of higher education as it is affected by trade agreements. Similarly, international educators and scholars in the field of education have conducted extensive studies of internationalization, but these have rarely been linked in specific ways to the globalization process or to the expansion of trade in higher education services promoted by numerous trade agreements. Furthermore, higher education administrators have been largely uninvolved and indeed unaware of the provisions in trade agreements that directly affect their institutions. Similarly, scholarly and professional associations give scant attention to trade liberalization's impact on the disciplines and professions, and they too have not been involved in the trade liberalization process, despite the enormous potential impacts of trade agreements on the production of knowledge and professional practice. The end result is that key issues such as quality assurance and accreditation are only now beginning to be addressed.[1]

Quality assurance procedures and accreditation arrrangements can be understood as part of the national regulatory responses, but they usually extend beyond the realm of national policy. Increasingly viewed as the natural response to higher education delivery which is increasingly diversified, international, and evolving rapidly, the focus is upon the quality and equivalence of credentials rather than the auspices of delivery (e.g., private or public), location (e.g., country of education) or method of acquisition (e.g., traditional campus or internet).

These issues affect higher education institutions everywhere, cutting across cultural, developmental and economic boundaries, posing a number of new questions such as the need for international quality standards, benchmarking, accreditation of transnational higher education, mutual recognition agreements, and the definition of outcomes-based assessment. Indeed, nowhere is the relationship between a globalizing, trade liberalizing world economy and the pivotal role for higher education organizational development more revealing than in the internationalization strategies brought forward to identify quality and equivalences in terms that are understandable across borders, and to make this information available to a wide range of stakeholders.

The report that follows is the result of a weeklong interdisciplinary seminar/workshop held 8-14 September 2001 in Victoria, Canada. The seminar/workshop was organized by the Centre for Higher Education Research and Development (CHERD) at the University of Manitoba,

[1] One exception is the work of the Center for Quality Assurance in International Education which has been dealing with these issues, particularly with respect to the professions, since 1993 in a series of conferences. A list of publications can be found at www.cqaie.org and materials on trade in education services at www.tradeineducation.org

funded by the Ford Foundation and attended by twelve invited scholars with a declared interest in the topics under discussion.[2]

The objective of the seminar was to: (a) explore the relationships between globalization, trade liberalization and higher education; (b) to share information on the implications and impact of various multilateral trade agreements on higher education; and (c) to contribute to the creation of a broad and illustrative research agenda on the subject.

Following two days of regionally-based presentations and discussions, participants adopted a comprehensive and longer-term approach to the establishment of a much-needed research agenda. They identified five major areas in which research needed to be conducted. They also took the position that a statement of a central research question would be of value in focusing the energies of the group and agreed upon the following wording: *What are the effects of current globalization and trade liberalization processes, particularly in terms of emerging global and regional trade agreements on higher education both nationally and internationally?*[3] It also agreed that: (a) in order for this framing question to be pursued appropriately, it would need to be set within the larger context of more general trends in higher education; and (b) it could be refined to include specific research questions where each question would also be shaped by context, national interest, stakeholder emphasis, availability of information and research feasibility. Throughout our discussions, there was an implicit and sometimes explicit expression of the need to strengthen the tools of comparative analysis in higher education.

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[2] Dr. John R. Mallea, Canada (Chair); Dr. Derek Hum, Canada (Rapporteur); Dr. Clyde Barrow, USA; Dr. Tony Adams, Australia; Dr. Eduardo Aponte, Puerto Rico; Dr. Victor Manuel González Romero, Mexico; Professor Maria José Lemaitre, Chile; Dr. Jean-Pierre Lemasson, Canada; Dr. Peter Maassen, Norway; Ms. Keiko Momii, OECD; Professor Akilagpa Sawyerr, Ghana; Dr. George Subotzky, South Africa.

[3] It is helpful to note that a general statement of the research issue is useful mainly for identifying the central focus; it does not prescribe any particular disciplinary limit, nor analytic approach, nor regional foci, nor methodological orientation. Nonetheless, deriving from a broad and general conception, one is guided in locating the contribution of each particular piece of detailed research, and to appreciate its contribution to the central research problem.

I. Higher Education and the Knowledge Society

A number of changes currently taking place in universities and colleges worldwide find their origin in the belief that societies are rapidly becoming knowledge societies. The key assumption underlying this belief is that economic productivity and wealth will be increasingly dependent on the production and application of new knowledge by highly trained knowledge workers. It is a nation's capability to apply new knowledge to existing knowledge, rather than physical capital, natural resources or traditional labour skills, that is essential for economic development.

While it is true that higher education has always been formally designed as a structure for the production, transfer and dissemination of advanced knowledge, the emergence of a knowledge-based society and economy has placed new pressures on it. The need for a flexible and versatile workforce, one that is constantly learning and upgrading its skills, has led to a continual demand for courses in which employees are re-trained and updated on a lifelong basis. Students now have to be prepared for a labour market in which they can be expected to change jobs many times, and they need to acquire appropriate skills that are transferable and portable across sectors, countries and cultures.

In addition, the traditional method of knowledge production is gradually being complemented by a mode in which research problems are identified and addressed in the context of application. This means that problems are not mainly tackled from a mono-disciplinary academic perspective, nor formulated based upon individual curiosity alone, but rather from various perspectives by a wider set of actors. This new mode of research requires a trans-disciplinary approach characterized by interaction among end users, producers and brokers of knowledge. Also, it increasingly involves educational institutions and enterprises which are global in scope. As a result, many aspects of traditional higher education institutions have to be adapted and modified.

Traditional universities and colleges have to take account of the strategies and activities of new highly competitive suppliers, both nationally and internationally. Increased competition, moreover, is not only coming from new forms of higher education establishments, but also from multinational, for-profit firms and companies which increasingly offer programs within and across borders. In addition, new forms of information and communication technology are eroding the national borders of higher education systems with important consequences for quality assurance, the protection of consumer and intellectual property rights, cultural maintenance and national identity construction.

Development of the knowledge-based society and economy has resulted in a number of trends in higher education which, while having been experienced differently in developed and underdeveloped countries, are nevertheless readily identifiable. These are:

- ***The changing objectives of higher education.***

While traditionally the public mission and social and cultural roles of higher education have tended to be emphasized in national policy discussions, much greater emphasis is now being placed on its economic role. Now there are growing expectations for increased participation rates and the market employability of graduates. Higher education institutions are being given more responsibility for meeting national economic development needs, and are increasingly accommodating the interests of the private corporate sector and a more market-driven environment. As a result, there is a growing need to clarify the social mission of higher education institutions.

- ***Higher education policy and practice are increasingly being related to new labour force demands for highly educated personnel.***

The purpose and functions of higher education institutions are increasingly being tied to their role in the new knowledge economy. This reflects the current concern with the links between higher education provision and the economic productivity and prosperity of a nation. New economic thinking concerning the determinants of long-term economic growth (usually referred to as the "new growth theory") not only gives a prominent role to the strong and smart but also, more importantly, to the swift. That is, nations which achieve a technological lead in areas of knowledge production are well placed to sustain that lead. Failure to "learn", on the other hand, will lead to an ever-widening gap in knowledge.

- ***Massification of higher education.***

The shift from the notion of elite access to higher education to one of universal access for all who can benefit has resulted in a worldwide increase in enrolment. Higher education, of course, continues to play an important role in social reproduction, but in most developing countries, despite increased absolute enrolment, participation rates are still very low, especially for particular groups. In the majority of developed countries, on the other hand, an already high participation rate has led to increased attention being given to the provision of continuing education on a lifelong basis.

- ***Increases in number and diversity of higher education suppliers.***

There has been an increase in the number and diversity of institutions providing higher education. Nationally, in addition to the regular full-time degree courses, there are increasing numbers of specialized institutions (professional, vocational, distance learning, continuing) and growing numbers of providers of short and research-intensive courses. At the international level, there is an increase in the number of providers using new forms and methods of delivery. Private for-profit providers are assuming greater importance in meeting excess demand. Cases of

partnerships between public and private institutions are also evident, leading to the blurring of public and private organizational forms, interests and practices.

- ***The use of new technology and new delivery both nationally and internationally.***

The application of the new technologies in higher education has taken many forms (satellites for the delivery of courses by radio; video; interactive TV; the Internet; multimedia materials; point-to-point and multi-point instruction), and are transforming educational delivery and extending its scope. Technological developments, moreover, have made the provision of courses across national borders both easier and cheaper, and falling costs have facilitated the mobility of faculty. More attention could profitably be paid to the type and content of these courses. Piecemeal evidence suggests that certain programs (in business and management, for example) are being delivered more frequently than others and this impacts differently on departments, faculties, schools and institutions.

- ***Changes in institutional practices and organization.***

Privatization pressures and the spread of the business culture are resulting in the introduction of more managerial governance arrangements in place of traditional collegial practices. Additionally, private sector partnerships with universities are promoting the commercialization of intellectual property, in essence creating a proprietary right to knowledge that is not available in the public domain. As a consequence, higher education institutions are under increasing pressure to adapt their traditional organizational practices.

- ***The internationalization of colleges and universities.***

For over a decade, colleges and universities in both the North and South have seen the need to place internationalization—as the process of integrating an international and cultural dimension into the teaching, research and service functions of the university—within university strategic frameworks. Internationalization has been a specific response of colleges and universities to the needs of their graduates to have competencies that will enable them to take their place in a globalized society. It has occurred in a variety of ways: through changes to the curriculum, through student and faculty mobility, through co-operative linkages between institutions for research and exchange, through the presence of foreign students on campuses and through the establishment of foreign campuses and courses.

Related Research Questions

Notwithstanding the considerable discussion of these trends in the literature on higher education, participants in the seminar/workshop were of the view that a number of important research questions still needed to be addressed:

- What is the relationship between the public and the private interest as it pertains to the provision of higher education, and how should nations develop their social capital?

- To what extent, and in what ways, do global and regional trade agreements interfere with the exercise of national policy-making, and the formation of international strategic alliances in the field of science and technology (S&T)?

- To what extent do such alliances coincide with trade groupings? And where they do not, what are the effects?

- What is the role of multilateral organizations in providing measures to balance the interaction between regional (block integration) economic trends and national development issues (equity, labour mobility, sustainability, etc.)?

- As well as helping meet short-term economic needs, what weight should be given to the role of higher education systems and institutions in creating an enlightened citizenry, a sense of national identity, and the long-term sustainable development of a society?

- What is the role of higher education in educating individuals to participate in a global context in cultural as well as economic terms?

- How are global trends affecting the organization and funding of higher education systems and institutions?

- How is the unmet demand for higher education best satisfied in developing countries: through strengthening the domestic delivery of programs or through importing them?

- What are the main changes in the structures and patterns of the international labour market, and how are these being influenced by the globalization of educational delivery and trade liberalization policies and practices?

- How are global and regional trade agreements affecting the supply and demand for highly trained professionals?

- What impact does the international trend towards greater accountability and adoption of the logic of business enterprises in higher education have on the social purpose of

higher education? Are public and private institutions of higher education affected differently in this regard?

II. The Emerging Global Economy

A key dimension of the emerging global economy is that it is an economy in which highly specialized and globally accessed information, knowledge and technology have been added to the traditional mix of land, labour, capital and entrepreneurship. It is an economy characterized by a production process that is far more knowledge-intensive, by labour markets that are becoming more internationalized, and by the importance of human capital defined as the sum total of a citizenry's knowledge, skills and experience. Also, it depends to an increasingly large extent on a rapidly expanding infrastructure of inexpensive, reliable, accessible and instantaneous communications technology.

The global economic system is increasingly being structured by multilateral and international agreements, legislative frameworks and regulatory mechanisms that are governing cross-border economic transactions, and redefining and reshaping national and regional alliances and relationships. As a consequence, state higher education policy is being influenced and affected by, for example, regional economic forces and domestic development goals and priorities. These forces and influences, moreover, are not necessarily complementary in nature.

The global economic restructuring currently underway inevitably raises questions regarding the continuing role of the nation-state with respect to higher education, and the need for it to adapt this role within the changed global context.

The changing role of the nation-state, we believe, is largely being determined by the new global economic order. We believe also that, while the individual nation state may be somewhat limited in its range of responses in regard to supranational forces, its continued role is critical in these three areas: (a) supplying leadership; (b) balancing the allocation of public resources and available private funding capacity; and (c) developing and applying the necessary and appropriate regulatory policies and mechanisms.

Related Research Questions

In pursuing research in the relationships between globalization, supranational trends and the changing role and responsibilities of the nation state, we consider the following questions could be usefully pursued by researchers on higher education:

- In the context of global restructuring, how are different nations identifying the national or public interest in higher education?

- What new roles and responsibilities in the higher education sector are emerging for national and sub-national governments?

- How are nation-states interpreting their roles and responsibilities in higher education with respect to issues of national development, identity and national sovereignty?

- How do asymmetries in nation-states in areas such as their level of economic development, national wealth, and the capacity to mobilize private funding, affect the extent to which they are capable of regulating the market with respect to higher education?

- Assuming that an individual nation-state cannot afford to adequately finance excess demand for higher education, what is the preferred balance between public and private funding, and what are the ways in which it might achieve this preferred balance?

- How are nation-states, sub-national governments, and regional (supra-national) governments responding to the impact of new international trade regime(s) on higher education?

- What are the actual impacts of various trade agreements on higher education systems at the regional, national, and institutional level?

- What are the implications of the trends in the global restructuring of higher education for the various internal constituents in the decision-making process of institutions, as well as for their overall institutional ethos and culture?

- To what extent is the social purpose of higher education obstructed by these trends in global restructuring?

- What are the appropriate policy objectives and strategies that higher education institutions should seek in their quest for commercial or government partners?

- How should universities safeguard academic freedom while seeking to commercialize intellectual property?

III. Multilateral Trade Liberalization

In order to understand multilateral trade liberalization's implications for and impact on higher education, given the paucity of existing research on the subject, it is necessary to first describe the purpose and content of its framing principles, multilateral organizations, mechanisms and agreements in some detail.

The General Agreement on Tariffs and Trade (GATT) has long been the most important trade agreement governing the global economic system.[4] Article I of GATT establishes most-favoured-nation (MFN) status as the trading system's basic principle of non-discrimination against imports on the basis of national origin. This principle requires each country now participating in the World Trade Organisation (WTO) to grant other parties to the agreement no less favourable treatment than is granted to the country receiving the most favourable treatment under its trade laws. Thus if a participating country decides to grant the imports of one country better or more favourable treatment than required by GATT, the better treatment is automatically extended to goods and services imported from all countries that are parties to GATT.

Since the end of World War II, GATT has provided the framework for eight rounds of multilateral trade negotiations.[5] In GATT's first seven rounds, negotiations mainly liberalized

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[4] The GATT was established in 1947 by 23 countries, including the United States, Canada, Great Britain, Western Europe, Japan, Australia, and New Zealand. The GATT was institutionalized through its Secretariat, which provided technical assistance, dispute settlement, and enforcement of the Agreement among member nations.

[5] The first round in Geneva (1947) resulted in significant tariff reductions, particularly by the advanced industrial countries that initiated the Agreement. Subsequent negotiations failed to produce any significant breakthroughs until the Kennedy Round (1963-1967) resulted in a 35 percent overall reduction in the average tariff level among participating nations. The Tokyo Round (1973-1979) resulted in another overall reduction of 34 percent in average tariff levels. By the early 1980s, the average tariff on most goods imported by the advanced industrial countries was under 10 percent, although GATT permitted higher tariffs for import-sensitive areas such as agriculture, textiles and apparel. In the Tokyo Round, governments also began negotiating new and improved rules on the use or removal of non-tariff barriers (NTBs). The OECD defines non-tariff barriers to trade as border measures other than tariffs that may be used by countries, usually on a selective basis, to restrict imports. Approximately 20% of world trade encounters non-tariff barriers and the trade coverage of these measures had tended to grow as tariff barriers were lowered. The United Nations Trade and Development Administration identifies 72 different types of NTBs in its classification scheme. NTBs include volume restraining measures (e.g., prohibitions and quotas), import authorizations (e.g., licensing, health and safety standards, technical standards, censorship), price controls (e.g., minimum prices, anti-dumping actions), and other barriers such as subsidies, favourable tax treatment of import sensitive industries, and anti-competitive practices by private firms.

trade regimes for the trade in goods among developed countries. During this time, there was very little trade liberalization by developing countries. For the most part, developing countries continued with import substitution strategies that relied on high tariffs, import licensing, foreign exchange rationing, and balance-of-payment restrictions as allowed under Article 18-B of the GATT. Moreover, international trade in services, a key growth sector in the new post-industrial economies, was not covered by previous iterations of GATT.

By the mid-1980s, many developing countries unilaterally abandoned import substitution policies and moved toward trade liberalization. They did so through a variety of bilateral and regional trade agreements negotiated with other developing countries.[6] In addition, in reaction to a perceived movement toward "closed regionalism" by Europe, Japan, and the developing countries, the United States initiated the Uruguay Round (1987-1994) as the eighth round of multilateral trade negotiations held under the auspices of the GATT. The Uruguay Round culminated in the World Trade Organisation treaty, signed by 135 of the world's 190 countries in Marrakesh, Morocco (April 1994), which became effective on January 1, 1995. It cut the developed countries' tariffs by an average of 38 percent and lowered their average tariff to only 3.9 percent.

Of especial concern to the higher education sector, the Uruguay Round also established a framework for trade liberalization in services that has the potential to extend GATT's provisions to large sectors of the knowledge-intensive and service economy.

The General Agreement on Trade in Services (GATS) is the first multilateral agreement to establish guidelines governing international trade and investment in the service sector. The GATS covers service industries, including education, that "conduct international transactions either by sending highly skilled personnel, technical information, or currency across national borders or by performing services for foreign entities through affiliates located overseas."

The GATS is fully integrated into the WTO, which has established a Council for Trade in Services to oversee the implementation of service agreements, to monitor on-going negotiations within the GATS framework, and to organize working groups on outstanding issues involving trade in services.

The GATS consists of three major components: (1) a framework of rules intended to discipline government regulation of trade and investment in services; (2) a set of schedules where each WTO member commits itself to apply these rules to specific service sectors, subject to defined exceptions; and (3) a series of annexes and ministerial decisions that supply additional sector-specific detail and identify follow-up activities required by the schedule. The framework

[6]This movement was stimulated partly by dissatisfaction with the results of import substitution strategies, the Latin American debt crisis, and a growing conviction that the export-oriented policies of "Asian tiger" countries were proving more successful in promoting economic development.

for trade in services obligates WTO members to respect fifteen general principles that apply to all services except those supplied "in the exercise of government authority."[7]

The GATT's most fundamental principles, including transparency of laws and regulations, recognition of operating licenses and qualifications to practice a profession, and most-favoured-nation treatment, are extended in principle at least to the service sectors. Governments can exempt themselves from the MFN obligation on a sector-by-sector basis, but the exemption is not to exceed 10 years and is subject to review within five years. Other principles, including market access and national treatment, are binding only to the extent that each member country commits itself to those particular principles for selected service sectors.

Once a country commits itself to a principle, it may choose to apply that principle to one or more of four modes of supply: commercial presence, consumption abroad, cross-border supply, and presence of individuals.[8] A country may also include "horizontal commitments" in its schedule, which limit the principle's applicability to trade in a limited number of service sectors, or it may be specific to only one mode of supply across a broad range of service sectors. Once a country has made a partial or complete commitment on market access or national treatment, the other GATS rules automatically apply to that sector.

Most of the initial commitments submitted by individual countries with respect to market access and national treatment were "standstill" commitments that merely promise not to impose new trade restrictions on foreign service providers. Thus, at this point, GATS merely provides an institutional framework for pursuing future liberalization in the service sector, including education, which is one of the most significant areas of growth in the global service sector.

Cross-border trade of educational services is distinguished under the GATS classification as: (i) *cross-border supply* in which only the service crosses the border as in distance learning; (ii) *consumption abroad*, where the consumer travels abroad to receive the service; (iii)

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[7] The principles are most-favoured-nation treatment, transparency without requiring the disclosure of confidential information, increasing participation of developing countries, economic integration so as not to prevent entrance into labour market integration agreements, domestic regulation, recognition, monopolies and exclusive service suppliers, business practices, emergency safeguard measures, payments and transfers, restrictions to safeguard the balance of payments, government procurement, general exceptions, security exceptions, and subsidies.

[8] *Commercial presence* includes corporations, joint ventures, partnerships, representative offices, branches, and other legal entities constituting foreign direct investment. *Consumption abroad*, often referred to as "movement of the consumer", occurs when a service is delivered outside the territory of the member making the commitment (e.g., tourism, ship repair, study abroad). *Cross-border supply* occurs when a service supplier is not present within the territory of the member where the service is delivered (e.g., services delivered through telecommunications, mail, international transport, e-commerce or internet sales, distance learning). The *presence of individuals* refers to natural persons who are service suppliers or employees of a service supplier who travels to another country to provide a service in that country (e.g., engineering consultant).

commercial presence, where foreign providers establish a presence in a country to deliver education; and (iv) *presence of natural persons*, where a professor, teacher, etc. travels to another country to deliver a service.

Cross-border trade of professional services is the ability of a professional person accredited in one country to practise his or her profession in another. It also relates to the ability of nationals of one country who have received foreign accreditation under the above definitions to practise their profession. In the past, most issues related to cross-border trade of professional services have revolved around national immigration policy and the ability of incoming immigrants to practise their profession. Today, this is joined by issues relating to globalization, the movement of professionals among transnational companies, and issues related to the impact of the cross-border trade of educational services. Particular issues relate to recertification in the professions and the impact of the entry of private providers into markets.

Under the GATS, trade in education services is classified in five categories: Primary Education, Secondary Education, *Higher Education*, Adult Education, and Other Education Services. The GATS will have its most significant impacts on trade in the latter three categories (higher education, adult education and other education services), since the agreement exempts trade in services that fall within the domain of "services supplied in the exercise of governmental authority", and it is widely accepted that primary and secondary education are covered by this exemption.

Related Research Questions

- How is higher education implicated in WTO and GATS?
- What are the likely effects of global trade agreements on traditional universities and colleges as the institutionalized domains of knowledge production, transfer and dissemination?
- How are higher education roles and responsibilities at the international, national and sub-national levels affected by global trade agreements and their reform ideologies?
- In what ways do National Treatment clause(s) and Most Favoured Nation clauses affect higher education provision and delivery?
- What role is the WTO playing in the field of professional services?
- Does the GATS treat higher education as a public or a private good? In particular, does the exemption for the "exercise of government authority" or the special treatment of "cultural industries" intentionally or potentially cover higher education?

IV. Regional Free Trade Agreements

Regional trading arrangements are a permissible exception to the GATT's most-favoured nation principle authorized by Article XXIV, which allows the establishment of free trade areas and customs unions. As a result, a potentially paradoxical consequence of global trade liberalization has been the simultaneous proliferation and expansion of regional free trade agreements in Europe, the Pacific Rim, Latin America, Africa, and North America. World trade is already quite regionalized, but it is becoming increasingly concentrated within three regional trading blocs defined by the European Union (EU), the Pacific Rim (APEC), and North America (NAFTA).

In the 1990s, economic regionalization accelerated with 34 different regional trading agreements reported to GATT from 1990 to 1994 alone. The most important regional trading areas are the Asia-Pacific Economic Co-operation Forum (APEC), the European Union (EU), Australia-New Zealand, the Common Market of the Southern Cone (Mercosur),[9] the Caribbean Community (Caricom),[10] the Andean Group,[11] the Central American Common Market, the Southern Africa Development Community (SADC),[12] and the North American Free Trade Agreement (NAFTA). In addition, a complex overlapping network of bilateral free trade arrangements has been established in each of these areas between individual countries, and between individual countries and other regional trading blocs.

To date, the implications of regional free trade agreements for higher education are largely unexplored. This helps explain why the workshop began with a chapter-by-chapter overview by the authors of the text "Globalization, Trade Liberalization and Higher Education in North America" which is to be published by Kluwer in 2002.

Related Research Questions

- Do trade agreements have the potential to override national sovereignty in the field of higher education, and the ability of governments to pursue "non-economic" or "non-commodified" objectives in higher education policy such as cultural, civic or social welfare goals?

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[9] The members of Mercosur are Brazil, Argentina, Paraguay, and Uruguay.

[10] The members of Caricom consist of the Caribbean island-nations and coastal nations, including Belize, St. Kitts, St. Lucia, Antigua, Montserrat, Bahamas, Guyana, Barbados, and Trinidad and Tobago.

[11] The members of the Andean Group are Columbia, Venezuela, Bolivia, Ecuador, and Peru.

[12] The members of SADC are Angola, Botswana, Lesotho, Malawi, Mozambique, Namibia, South Africa, Swaziland, Tanzania, and Zimbabwe.

- What objectives are defined for higher education in the agreements? Do they define global or regional higher education policies? How is educational trade treated in the free trade agreements, and how does that relate to the national definitions?

- How do various trade agreements define "intellectual property"? How have provisions on intellectual property been applied in case law and dispute resolution procedures? How do these provisions affect patents and copyrights held by universities and faculty under national and international laws, including regulations related to intellectual property in transnational educational and professional products?

- How are quality assurance and accreditation issues being addressed at the global, supranational, regional and national levels?

- What Mutual Recognition Agreements in higher education exist and what are their requirements?

- What are the major purposes for quality assurance schemes? Are they evaluative? Supervisory? Or is their purpose one of control?

- What are the criteria adopted for accreditation? Is it an institutionally focussed one of "fitness for purpose"? Or is it a more prescriptive "fitness of purpose"?

- What indicators are being employed for cross-border quality assurance purposes? Are they mainly qualitative and goal-oriented definitions? Or are do they comprise quantitative and comparative measures?

- What is the operational focus? Is it the individual institution, units within institutions, programs or individuals?

- Furthermore, who "owns" the quality assurance process? That is, who defines the orientation of the process, the criteria and procedures to be applied?

V. Trade in Education Services

In 1995, the international market for global higher education was estimated at U.S. $27 billion and in 1999 at around U.S. $30 billion. Education services are traded primarily through student mobility across borders (consumption abroad) and, therefore, the largest current source of receipts for higher education services comprises student fees paid to attend traditional colleges and universities in host countries. Currently, more than 1.5 million students study abroad and this number is continuing to grow each year. The USA is the leading exporter of education services, and commands approximately one-third of the total world market for higher education services.[13] In 1998, the USA exported nearly $9 billion in higher education services and recorded a trade surplus in higher education services of about $7.4 billion.

The global market for higher education services delivered through traditional institutions of higher education has continued to expand as measured by the increasing number of students studying abroad (consumption abroad), the number of foreign visiting scholars travelling abroad to teach and conduct research (presence of individuals), international marketing of curricula, textbooks, and distance learning programs (cross-border supply), and the establishment of branch campuses in foreign countries (commercial presence).

By 1998, over thirty countries had made specific commitments in the education services sector with 21 commitments in the area of higher education services.[14] The countries making commitments to liberalize trade in higher education services included all but two (France and Russia) of the world's ten largest exporters of higher education services.

Services in higher education are a growing industry which is branching out into: (1) the new providers of higher education referred to above, such as for-profit education and training facilities and corporate-sponsored universities; (2) new methods of delivery, such as distance learning via the internet, radio, and television; and (3) new activities, such as educational support services and educational testing services. Other changes in the domestic and international structure of higher education services markets have promoted the development of "other" higher education services that support educational processes or systems, such as educational testing services, student exchange program services, and study-abroad facilitation services.

Unfortunately, though, official trade data on higher education services woefully underestimate the actual levels of cross-border activity, since official trade statistics at the national and international level only estimate the value of the tuition and living expenses of

[13] The ten leading exporters of higher education services (consumption abroad) are the USA, France, Germany, United Kingdom, Russian Federation, Japan, Australia, Canada, Belgium, and Switzerland.

[14] Australia, Austria, Belgium, Canada, Czech Republic, Denmark, Finland, Germany, Greece, Iceland, Ireland, Italy, Japan, Korea, Mexico, New Zealand, Norway, Portugal, Spain, Switzerland, Turkey, United Kingdom, United States.

students enrolled in foreign colleges and universities (consumption abroad). These statistics do not capture the full value of international trade in higher education services. The official statistics on trade in higher education services, including those of governmental and international organizations, do not include fees paid by students enrolled in any form of electronic or distance education (cross-border supply), fees paid by students receiving instruction in their home country from foreign providers (commercial presence), or those being instructed in their home country by visiting foreign teachers or trainers (presence of individuals). The official statistics simply do not capture the foreign trade in higher education services conducted by for-profit educational institutions (e.g., language institutes) or by corporate education and training facilities in foreign countries, because these activities are recorded by the host countries as part of the gross "domestic" product.

Related Research Questions

In addition to basic data needs, the growing international market for educational and professional services raises the following research questions:

- What are the actual impacts of various trade agreements on higher education systems at the regional, national and institutional level?
- What are national policy options for different countries with respect to trade of educational and professional services? What factors determine final policy decisions? How are these implemented?
- What are the issues at stake for the labour market and the economy?
- What is the impact on professional practice within the country?
- How are regional trade agreements affecting the structure and patterns of, and trade in, higher education and professional services?
- How can information on cross-border trade in higher education and professional services best be collected, categorized and disseminated?
- How do different stakeholder groups address these issues, and how are they taken into account in the identification of policy options?
- What are the national regulatory responses to the treaty definitions of trade in educational and professional services (including the consequences of 'national treatment' clauses)?
- Who are the main providers of international educational services, in terms of public or private entities?
- How does the difference between 'surplus' and 'profit' affect the social and economic costs and benefits of trade in educational services?
- Net exporters of educational services have been in the past developed countries. Increasingly, countries in transition are themselves becoming exporters (although not net exporters). What are the impacts of exporting and importing higher education services on these *bridging* countries, and the relationship of these developments to trade liberalization?

- How does a given country benefit from international offerings (countries that are importers, or exporters, or both)? What are the costs and benefits involved?
- What are public and private roles and responsibilities of those involved in trade in educational services in terms of the development of social capital?
- What are the emerging models of trade in educational services and how are these affected by trade liberalization? For example, commission agents who recruit students or private organizations that have teamed with foreign providers in commercial presence relationships are now themselves becoming multinational and global.
- What are the main stakeholder groups and what are their needs in terms of information?
- What are the information dissemination systems operating in different environments?

Conclusion

The workshop can be said to have achieved its main objective of mapping a broad agenda for research on the relationships between, and effects of, globalization and trade liberalization on higher education. Individuals, groups and organizations, it is hoped, can use the report as a starting point in articulating specific research proposals in the area.

Much work has been done on the European Union, and work on NAFTA has begun. In the very near future one can also expect to see studies on the differing impact on higher education of trade liberalization regimes such as APEC, CARICOM, COMESA, MERCOSUR, SADC and TRANSMAN. Increased attention, too, will be given to trade in education and professional services and its impact on the international and intercultural dimensions higher education institutions and their programs.

As the research in these areas continues, or gets under way, it would be helpful if some measure of coordination and cooperation could occur with respect to selection of topics, development of common hypotheses and conceptual categories, the identification of relevant indicators (both qualitative and quantitative), the analysis of relevant data, and the comparative framework for national and regional case studies.[15]

Finally, it is worth restating and re-emphasizing the importance of carrying out research to inform both national and regional policy and practice in higher education. This is particularly true at this time with respect to research on trade in education services. Discussions of this area are now underway in the negotiations process leading up to a General Agreement on Trade in Services (GATS), and here it is crucial that the higher education community base their input to these negotiations on the results of careful and well-considered analysis and research. It cannot expect, nor should it, that trade negotiators will address the implications of their work for higher education systems, institutions, faculty and students.

[15]To this end, a List Serve of interested scholars is being created, but it would be preferable if some higher education agency or centre could assume administrative responsibility for overseeing the development of research in these areas.

Appendix I. List of Participants

FORD FOUNDATION WORKSHOP

GLOBALIZATION, TRADE LIBERALIZATION and HIGHER EDUCATION

September 8-14, 2001
Dunsmuir Lodge, British Columbia

List of Participants

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Appendix II. Schedule for Seminar/Workshop

SEMINAR WORKSHOP

GLOBALIZATION, TRADE LIBERALIZATION AND HIGHER EDUCATION

Saturday
8 September:

18:30 REGISTRATION & RECEPTION
PENINSULA LOUNGE (HOST BAR & APPETIZERS)

19:00 DINNER.

Sunday
9 September:

09:00 – 09:15 **INTRODUCTORY REMARKS.**
Dr. John R. Mallea, Chair
President Emeritus, Brandon University
Senior Adviser, CHERD

09:15 – 09:30 **CENTRE FOR HIGHER EDUCATION, RESEARCH AND DEVELOPMENT (CHERD), UNIVERSITY OF MANITOBA.**
Dr. David Kirby, Director, CHERD
Mr. Brian Fijal

09:30 – 09:45 **OVERVIEW OF EL COLEGIO DE MEXICO PROJECT ON "GLOBALIZATION, TRADE LIBERALIZATION AND HIGHER EDUCATION IN NORTH AMERICA".**
Dr. John R. Mallea, Chair

09:45 – 10:30 **CHAPTER ONE: GLOBALIZATION, TRADE LIBERALIZATION AND THE KNOWLEDGE ECONOMY.**
Dr. Clyde Barrow, Director
Center for Policy Analysis
University of Massachusetts

10:30 – 11:00 Refreshments Break.

11:00 – 12.30 **CHAPTER TWO: THE CANADIAN CASE.**
Dr. John R. Mallea, Chair

12:30 – 14:00 Lunch.

14:00 – 15:30 **CHAPTER THREE: THE MEXICAN CASE.**
Dr. Victor Manuel González Romero, Dean
University of Guadalajara
Senior Adviser, CHERD

15:30 – 16:00 Refreshments Break.

16:00 – 17:30 **CHAPTER FOUR: THE U.S.A. CASE.**
Dr. Clyde Barrow

19:00 Dinner.

Monday
10 September:

ROUNDTABLE I: REGIONAL TRADE AGREEMENTS AND THEIR IMPACT ON HIGHER EDUCATION, THE PROFESSIONS AND TRADE IN EDUCATIONAL SERVICES.

09:00 – 09:15 **INTRODUCTORY REMARKS**
Dr. John R. Mallea, Chair

09:15 – 10:30 **NON-TRADITIONAL PROVIDERS OF HIGHER EDUCATION: ISSUES AND IMPLICATIONS**
Dr. Rod Dobell, Past Director
School of Public Administration
University of Victoria, B.C., Canada

10:30 – 11:00 Refreshments Break.

11:00 – 11:45 **CORPORATE INTERNATIONALIZATION OF HIGHER EDUCATION**
Dr. David Strong, Past President and Vice-Chancellor
University of Victoria, B.C., Canada

11:45 – 12:30 **GROUP DISCUSSION**

12:30 – 14:00 Lunch.

14:00 – 15:30 **MERCOSUR**
Dr. Maria José Lemaitre, Secretary General
National Accrediting Commission, Chile

15:30 – 16:00 Refreshment Break

16:00 – 16:45 **COMMON MARKET FOR EASTERN AND SOUTHERN AFRICA (COMESA) AND SOUTH AFRICA DEVELOPMENT COMMUNITY (SADC)**
Dr. George Subotzky, Director
Education Policy Unit
University of the Western Cape, South Africa

16:45 – 17:30 **RAPPORTEUR'S REPORT**
Dr. Derek Hum
Professor of Economics
University of Manitoba

19:00 Dinner.

Tuesday
11 September:

ROUNDTABLE II

09:00 – 09:15 **RAPPORTEUR'S INTRODUCTORY REMARKS**
Dr. Derek Hum

09:15 – 10:30 **TRANS TASMAN**
Dr. Tony Adams, Director
International Programs
Macquarie University, Australia

10:30 – 11:00 Refreshments Break

11:00 – 12:30 **CARICOM**
Dr. Edward Aponte, Professor and Coordinator of Higher Education Studies
Center for Educational Research
University of Puerto Rico, Puerto Rico

12:30 – 14:00 Lunch

14:00 – 15:30 **THE EUROPEAN UNION**
Dr. Peter Maassen
Higher Education Development Association
University of Oslo, Norway

15:30 – 16:00 Refreshments Break.

16:00 – 17:30 **GLOBALIZATION AND TRADE LIBERALIZATION**

- Association of Universities and Colleges of Canada Report
  Jean-Pierre Lemasson, Director
  Office of International Cooperation
  University of Quebec at Montreal, P.Q., Canada
- Centre for Educational Research and Innovation (CERI) Report, OECD
  Ms. Keiko Momii, CERI, OECD

19:00 Dinner.

Wednesday
12 September:

09:00 – 09:15 **INTRODUCTORY REMARKS**
Dr. John R. Mallea, Chair

09:15 – 10:30 **GROUP DISCUSSION: MAPPING A RESEARCH AGENDA CROSS-BORDER TRADE IN EDUCATIONAL SERVICES**

10:30 – 11:00 Refreshments Break.

11:00 – 12:30 **WORKING GROUPS**

12:30 – 14:00 Lunch.

14:00 – 19:00 Recreational Activities.

19:00 **Evening open for participants**
(Dinner on own)

Thursday,
13 September:

09:00 – 09:15	**INTRODUCTORY REMARKS.** Dr. John R. Mallea, Chair
09:15 – 10:30	**CENTRAL RESEARCH QUESTIONS** Dr. Peter Maassen
10:30 – 11:00	Refreshments Break.
11:00 – 12:30	**SPECIFIC RESEARCH AREAS AND QUESTIONS** Working Group Discussion
12:30 – 14:00	Lunch.
14:00 – 15:30	**SPECIFIC RESEARCH AREAS AND QUESTIONS** Working Group Discussion (continued . . .)
15:30 – 16:00	Refreshment Break.
16:00 – 17:30	**INTEGRATION OF WORKING GROUP REPORTS.** Dr. John R. Mallea, Chair
18:30	Reception
19:00	Banquet

Friday,
14 September:

09:00	**DRAFT REPORT**
09:00 – 09:15	**INTRODUCTORY REMARKS** Dr. John R. Mallea, Chair
09:15 – 10:30	**DRAFT REPORT, GROUP DISCUSSION AND FEEDBACK.**
10:30 – 11:00	Refreshments Break.

11:00 – 12:30	**WORKSHOP OUTCOMES AND FOLLOW-UP.** Dr. John R. Mallea, Chair
12:30 – 14:00	Lunch.
14:00	Workshop Ends.

Appendix III. List of Related Readings

Adams, T. (1999). "The internationalization of Australian and Canadian universities: A comparison". Paris: INTRUDA.

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